

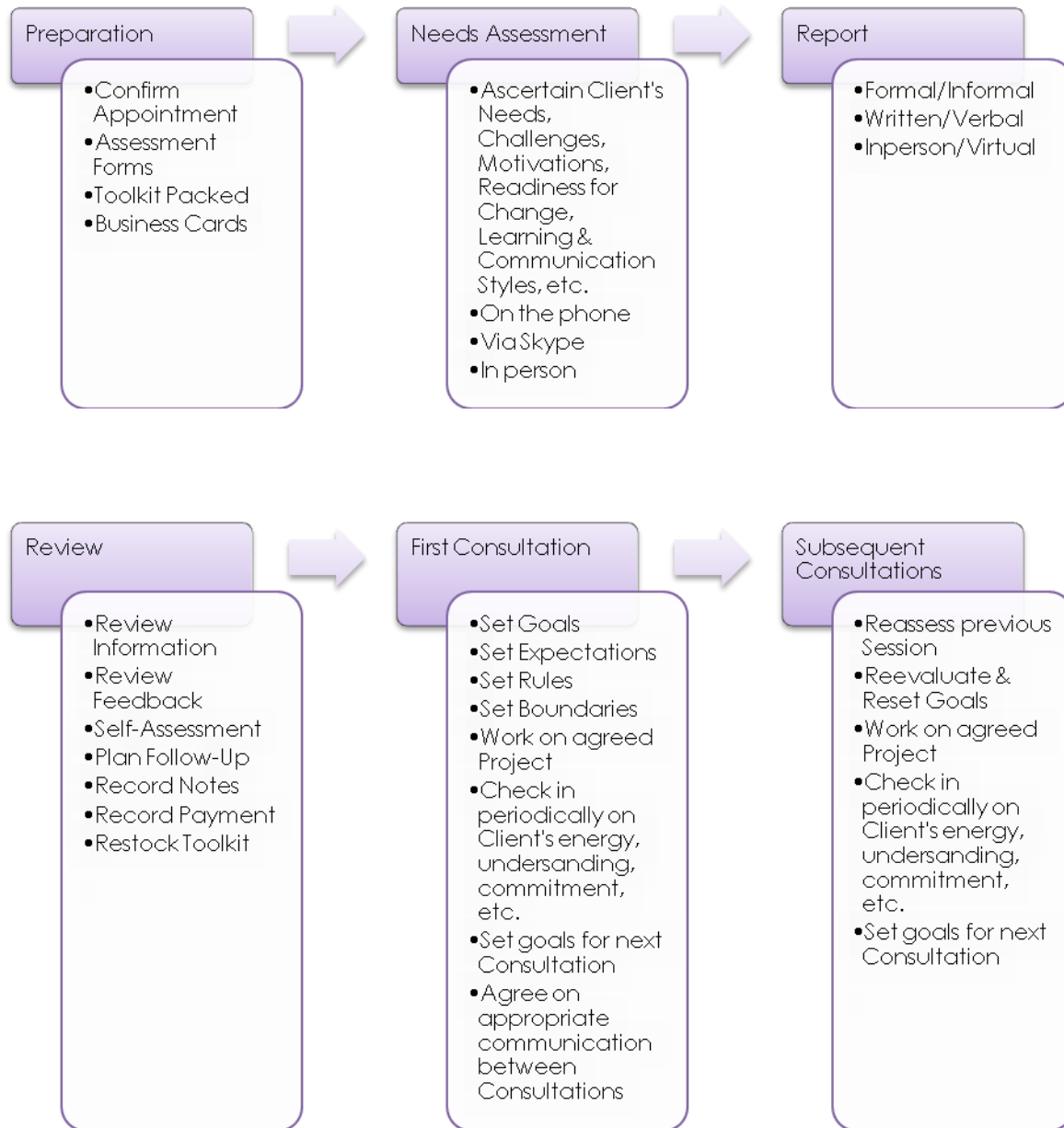


Creating Order  
from Chaos

# **Professional Organiser Training**

## **Module 3 – Confident Consultation**

## Work Flow



## The Needs Assessment

Needs Assessments can take many forms:

- Formal or informal
- Written or verbal
- In person or virtual
- Separate or in conjunction with first consultation

They are used to assess:

- Needs
- Goals
- Circumstances
- Motivations
- Readiness for change
- Learning styles
- Preferred communication styles
- Suitability
- Scope of the project
- Expected timeline of the project
- Realistic timeline of the project
- Budget
- Potential stumbling blocks
- The whole space
- Attachment
- Cause of the problem

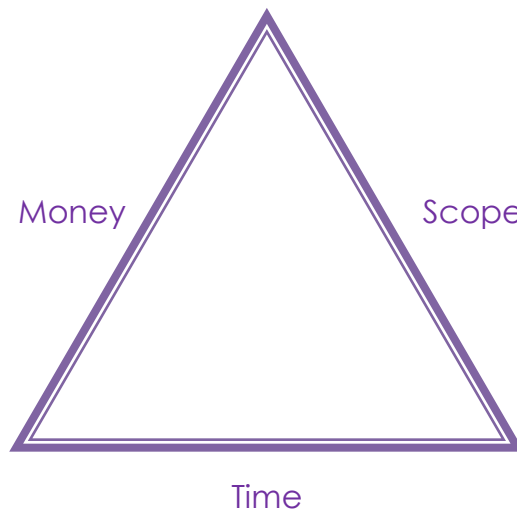
What else will you want to assess?

## The Consultation

Every client will have many different goals. They could be big picture goals, e.g. “to create an organised office”; medium term goals, e.g. “set up system for incoming paperwork”, and immediate goals, e.g. “find missing receipts to enable tax assessment”. Each consultation begins with an assessment of goals.

Another of our roles is to manage expectations.

There are 3 variables of any project – time, money and scope. It's important we help clients to realise the consequences of the variations.



## Keeping Safe

Very often you will be alone or 1:1 in a client's home or workplace, in unfamiliar surroundings.

- Have an action plan for if and when you feel unsafe
- Always tell someone you trust where you will be and when to expect your return
- Keep your phone with you
- Have an agreed code word and know when to use it
- If worried, make any excuse to get to a place of safety

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Working safely includes protecting your body from undue strain.

- Don't lift or move heavy objects
- Protect your lungs from dust, mould and other irritants and allergens
- Be aware of workplace dangers in general
- Keep a First Aid Kit in your car
- Insist on the same care for your client, even though they may take risks when you are not with them

## Watch the Signs

Be ever vigilant for signs that:

- Your client is becoming overwhelmed
- Your client is physically tired
- Your client is losing focus
- You are affected by any of the above
- Boundaries are being tested
- Boundaries have been breached

## Getting Great Feedback

What is great feedback?

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How will you get it?

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## Capturing Great Testimonials

Recognise a great testimonial when you see or hear one. When it comes, ask permission to use it. If it hasn't come yet, ask for one.

Once a great testimonial comes your way, where will you use it?

- On your website
- In other marketing material
- In conversations with prospective clients
- Speaking at networking events
- In proposals
- On your email signature
- In your "Fabulous File"